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ABSTRACT

Because an option for early retirement in Canadian Universities has created a need to know more about the vacancies early retirement creates and the potential to fill these vacancies, a survey of 15 representative universities was conducted. The sample included institutions of faculty numbering less than 100 to institutions of faculty numbering more than 1,200. The data revealed that the early retirees are primarily males motivated to retire early for a variety of reasons: availability of plans, diminished job satisfaction, health, climatic condition of the city, burn-out, desire to move to a retirement home, incompatibility, family, advantages of the plan, personal and institution's dissatisfaction, financial considerations, personal reasons, uncomfortable work station, expectation of university regarding scholarly activities, pursuit of other interests while drawing a pension and other career opportunities. Their value to the university was dispersed throughout the faculty members' teaching research and service duties. Projected areas of critical shortage due to early retirement are accounting, economics, engineering, computer science, commerce, administration, and psychology. Institutions offered a variety of predictions as to their ability to fill vacancies that would be created from 1990 to 1995. (JB)

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The Early Retirees of Canadian Universities

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The Early Retirees of Canadian Universities

Since 1977 early retirement has been an option exercised at Canadian universities. Consequently, it is imperative that the administrators of universities have a realistic conception of the potential to fill the vacancies created as a result of early retirement. In addition, in what capacity the early retiree was most valuable to the institution must be known for it is this defined competence that must determine the parameters of the search for the new faculty member.

To determine the extent to which this information is known and thus assumed used by university administrators, a survey methodology was employed. Fifteen universities responded. The institutions are located throughout the regions of Canada and can be considered representative on a national scale.

Characteristics of Responding Institutions

Institutions participating in the study had tenured and tenured-track faculty numbering less than 100 (two institutions),

between 100 and 400 (five institutions), between 700 and 900 (three institutions), and more than 1200 (two institutions). Three chose not to provide general information about their institution. Categories of faculty not included in the above count but for whom the institution must plan and provide retirement benefits included: clinical medical faculty, support staff, limited term appointments, administrative and instructional associates with continuing appointments, and tenured professional associates. Within this grouping support staff and clinical medical faculty dominated. Five institutions reported a number of faculty for whom the rules of the institution do not require provision of any retirement benefits. (In one case, although there is this provision, which is based on an age factor, it has not been acted upon.) Faculty affected included visiting faculty, education faculty in O.T.S.F., full-time and part-time sessionals, first year part-time or term employees, employees in term positions of less than two years' duration.

Profile of the Early Retiree

The data revealed that the early retirees are primarily male

faculty members[1] who were motivated to leave early for the following reasons:

*availability of plans
*diminished job satisfaction
*health
*climatic condition of the city
*burn-out
*desire to move to retirement home
*incompatibility
*family
*advantages of the plan
*elimination of the reduction in the pension plan formula for early retirement plus additional financial incentives
*personal and institution's insatisfaction
*personal reasons
*uncomfortable work station
*expectation of university re scholarly activities
*financial
*able to pursue outside interest and still draw a pension
*other career opportunities

Furthermore, their value to the university was dispersed throughout the faculty members' teaching responsibilities, research productivity, and service to the university in areas

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[1]Five institutions provided the following female/male ratio of faculty opting for early retirement:
*5% female/ 95% male
*22% female/ 78% male
*21% female/ 79% male
*50% female/ 50% male
*5% female/ 95% male

other than teaching and research. However, is most instances the faculty member's strength was teaching and service. Furthermore, teaching responsibilities resided primarily at the undergraduate level.

Projected Areas of Critical Shortages

Areas in which critical shortages are projected or are seen as becoming more acute because faculty opt for early retirement are:

*Accounting
*Economics
*Engineering
*Computer Science
*Commerce
*Administration
*Psychology

Ability to Respond

Against the above backdrop, institutions were requested to predict their ability to fill whatever vacancies that would be created during the period 1990 - 1991 through 1994 - 1995. Not all surveyed institutions were able to provide this information. The responses of the institutions that were able and willing to predict their ability to effectively address the voids caused by

early retirements are given below.

*"Expect to recruit without major problems.
(a) competitive salaries
(b) good collective agreement
(c) desirable city
(d) unique bilingual institution"

*"We are experiencing now and will continue to experience difficulties in areas such as accounting, economics, engineering. In addition, we may see difficulties in education. There will be a highly competitive market place."

*"Based on the last 45 years there should be little difficulty. Shortages in the second half of the decade are to be anticipated."

*"Some of the vacancies are being filled on a delayed basis in order to fund the financial incentives involved in the early retirement. To date the retirements have not been in the departments where recruitment is a problem. In fact the areas where problems are encountered are not scheduled to have any early retirements."

*"faculty tends to stay until age 65 and beyond"

*"very few will qualify for early retirement. No major effect"

*"Approximately 80% of vacancies would be filled, but the ability to fill the positions varies depending upon the discipline in which the vacancy occurred."

Concluding Comments

Early retirement programs have proven to free disaffected faculty from their associated university. The reasons for faculty members to consider early retirement varies considerably and is obviously tempered by the personal and work circumstances at the time. Yet, this information was more easily obtained than the value the retiring faculty member had to the university in terms of teaching responsibilities, research productivity, and service to the university other than teaching and research. Though the university has turned to early retirement programs as a means to alter the retirement of faculty, the alterations that have occurred in terms of contributions to the university is unclear. What is very definitive is the disciplines that will be mostly affected by early retirement.